

# Williams Rail Review

Barriers to travel: How to make rail more attractive to infrequent and non-users

April 2019

## Introduction

Much of the focus of the Rail Review so far has rightly been on existing passengers. Meeting their needs and ensuring they are at the heart of the railway is a key requirement. However, all businesses need to keep one eye on developing the market and attracting future customers.

Over the past 20 years rail passenger journeys in Great Britain have more than doubled. Despite this, and as stated by the Rail Review team, rail still accounts for only 2 per cent of all trips made and 8 per cent of distance travelled in England<sup>1</sup>. So there is still a considerable potential market that remains untapped.

All of this gives new impetus to understanding the barriers to using rail. This submission from Transport Focus to the Review looks at why people do not use rail - or only do so infrequently, and perhaps more importantly, what might persuade them to give it a go.

## Sources

This report draws on Transport Focus's and the Department of Transport's publications. These are referred to throughout the paper, generally for ease of reference, by the date of publication. A brief overview of the source material at this point may help to provide greater context:

Transport Focus:

- [Tomorrow's passengers: understanding how to make rail travel more attractive to infrequent and non-users](#). *Transport Focus*. April 2018

Why people do not use rail or only do so infrequently and what might make them travel more.

- [East Anglia Franchise](#). August 2015. Transport Focus  
Asked lapsed and non-users of the Greater Anglia franchise why they do not use rail and what might encourage them to do so.
- [Cross Country franchise research](#). Transport Focus. 2018  
Examined the reasons why travellers do not make more use of Cross Country and passenger experiences of interchange.
- [Integrated Transport: perception and reality](#). Transport Focus and ATOC 2010.  
Examined how the rail industry could attract more people, the barriers hampering this and the role that getting to and from a station plays when considering whether to travel by rail.

Department for Transport:

- [Public attitudes towards train services 2018](#). DfT, published 2019  
Report on public attitudes towards rail services, including infrequent and non-users.

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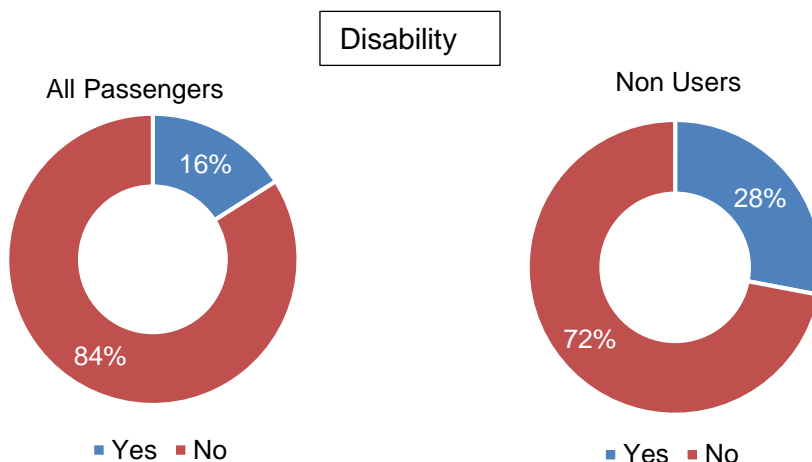
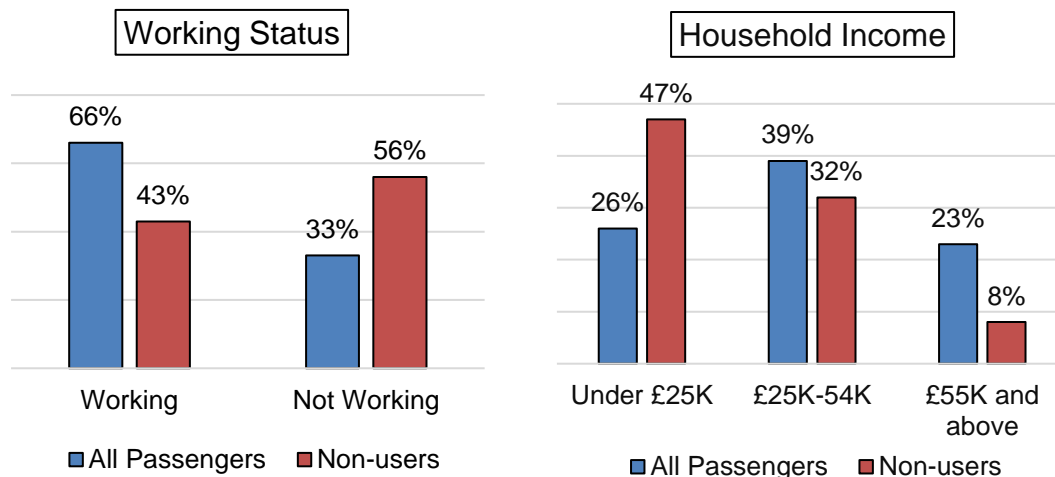
<sup>1</sup> The Role of the Railway in Great Britain. Williams Rail Review. February 2019

## Who are non-users?

Any successful business needs to understand its customers: who are they, what do they buy, when and how? It can be just as important to know who does *not* buy your products – you cannot target those potential customers if you do not know who they are.

In 2018 Transport Focus published a report looking at the views and aspirations of non-users (those who had not travelled by train in the last 12 months) and infrequent users (those who claimed to travel every six months or less)<sup>2</sup>. The report looked at the characteristics of those who use trains more frequently and compared this with those who had not travelled by rail in the last 12 months. There were a number of key differences. Non-users were more likely to:

- not be working
- have a lower household income
- live in a village location
- live further away from a train station
- have a disability.



All passengers:  
all those who have  
travelled by train in  
the last 3 months  
(12,804)

Non-users:  
those who haven't  
travelled by train  
in the last 12  
months (2,010)

<sup>2</sup> Tomorrow's passengers: understanding how to make rail travel more attractive to infrequent and non-users. Transport Focus. April 2018

For infrequent users, the profile is closer to those of passengers overall. They were more likely than the non-users group to be working (58 per cent), have higher household incomes (31 per cent with income below £25,000) and with a similar proportion of disabled people (15 per cent) – however the main similarity with non-users is that they too are more likely to live in village locations (25 per cent).

DfT's research in 2018 into public attitudes towards train services also explored differences between users and non-users<sup>3</sup>. It reported that fewer adults in routine and manual occupations used trains; 53 per cent compared to 67 per cent of those in intermediate occupations and 80 per cent of those in managerial and professional occupations.

It also found that those in the highest household income groups were more likely to have used rail, with 80 per cent of those living in households with a gross annual income of £31,200 or more having used a train in the previous 12 months, compared to those in lower income households.

It will clearly be hard for the industry to target all non-users. However, these findings suggest there may be socially excluded groups who might be prevented from travelling by train due to factors such as cost or disability.

## **Attitudes towards rail**

Transport Focus has an increasing body of research setting out what passengers think about rail travel. What is interesting is that those not using rail tend to have a less positive view of the industry overall than those who do.

Transport Focus's 2018 research asked users and non-users to rate their feelings about the rail industry in general. Among non-users 18 per cent were positive and 20 percent were negative; for passengers it was 35 per cent positive and 10 per cent negative.

DfT's 2018 research also found that non-users were generally more likely to rate rail services more negatively. When looking at short-distance journeys they found significant differences between users and non-users in the following areas:

- 61 per cent of users rated the levels of personal safety on board positively compared to 44 per cent of non-users;
- Users were more likely than non-users to rate the information on fares before travelling positively (62 per cent of users compared to 46 percent of non-users);
- 27 per cent of users rated the cost of parking at stations positively whilst 16 per cent of non-users rated this aspect of short-distance rail services positively
- 65 per cent of users rated the overall quality positively compared to 56 per cent of non-users.

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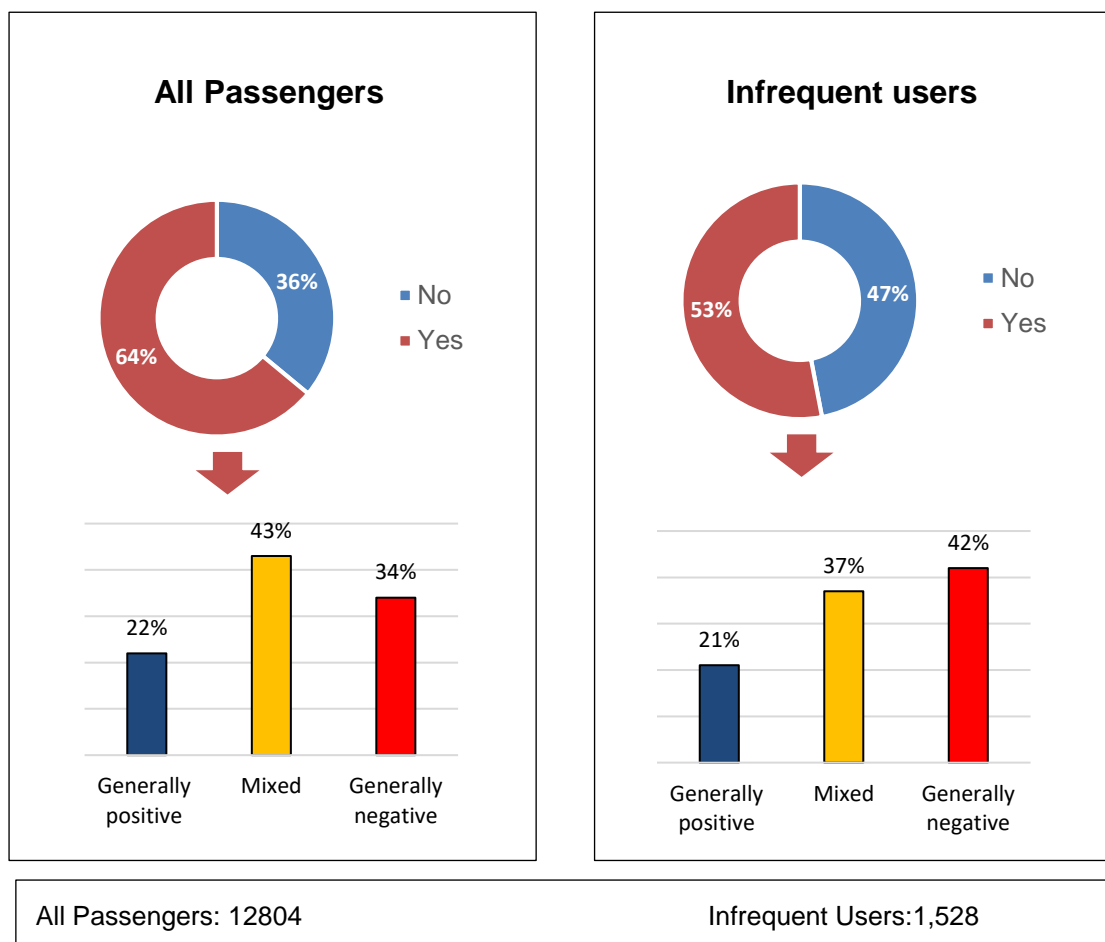
<sup>3</sup> Public attitudes towards train services 2018. DfT. 2019

### *Where do these views come from?*

Some reflect previous personal experience – many will have used rail at some point in their life even if they now consider themselves a non-user. However, DfT found that while nearly all (94 per cent) of rail users based their opinions on personal experience, just over half (54 per cent) of non-users did so. Non-users were more likely than users to have based their view on information from friends, family and colleagues, national press, local press, radio, other information and television.

Transport Focus's own research (2018) also bears this out. Infrequent users are less likely than passengers as a whole to have seen or heard anything about the railways recently, and when they have heard something it is more likely to be negative. These views are often fed by media reports and by friends or family recounting their own personal 'journey from hell'.

### ***Whether seen or heard anything positive/negative about the railways recently***





These perceptions do not need to be specific to a train company or service. Transport Focus's franchise-related research suggests that assumptions and perceptions can often be more generic to the industry as a whole.

For example, as input into the Greater Anglia franchise consultation Transport Focus conducted research into passenger priorities for the new franchise<sup>4</sup>. Part of this involved focus groups with 'potential' users (those who did not currently use rail but who could switch modes if they chose). These groups reported generic negative perceptions and stereotypes including:

- a belief that certain trains were likely to be overcrowded
- expectations that the service will be unreliable and rolling stock will be of poor quality
- an impression that there will not be enough staff to provide the required level of service

As one lapsed user from Norwich said: *"It doesn't give me a lot of confidence when I hear on the news the Eastern Region needs to spend four billion pounds to get up to standard. You'd think 'bloody hell it must be bad' "*

Research<sup>5</sup> into aspirations for the CrossCountry franchise reached similar conclusions. The perception was that trains in general are difficult to use (fares, interchange) and that the actual experience can not only be unpredictable but is often unpleasant (overcrowded, delayed).

Perception is clearly a key issue when it comes for forming views about rail. These can be based on previous personal experiences and from the more negative narrative that currently surrounds the rail industry.

## How do people choose which mode of transport to use?

Transport Focus's research<sup>6</sup> suggests that two main factors tend to drive modal choice:

### *Cost of the journey.*

When comparing car and public transport use, people typically just consider petrol and parking costs – they do not tend to factor in things like depreciation and servicing. These are seen as part of the general cost of owning a car rather than specific to the cost of making a journey.

If a group is travelling together then the price per person also becomes more of an issue. This

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<sup>4</sup> East Anglia Franchise. August 2015. Transport Focus

<sup>5</sup> Cross Country Passenger Research. Transport Focus. June 2018

<sup>6</sup> Integrated Transport: perception and reality. Transport Focus 2010

Environmental Issues. Transport Focus. 2007 [This looked at the extent to which environmental considerations were factored into decisions on whether to drive or take the train. It found that 'being green' was not a top-of-mind issue – the main factors being cost and convenience].

East Anglia Franchise. August 2015. Transport Focus

also can put public transport at a disadvantage. Four people in a car can share petrol costs and reduce the cost per person. On public transport the costs typically increase with each extra person travelling.

### **Convenience**

This can take many forms. For some it is the overall door-to-door journey time that matters, for others it's comfort, the potential to work/relax while travelling or the ability to travel when they want rather than be tied to a timetable or the ease.

There is also a familiarity factor. For some there is no rational decision-making process where options are considered, it's more a case of 'I always do it this way...' or 'I don't know how to do it another way'.

## **What are the barriers to using rail?**

Unsurprisingly, many of the barriers to using rail are also linked to cost and convenience. This has also remained consistent across various pieces of research and over time.

Back in 2010 Transport Focus joined with the Association of Train Operating Companies (now known as the Rail Delivery Group) to examine integrated transport and barriers to using rail<sup>7</sup>.

The top five reasons for not using rail at that time were:

- Cost (31 per cent of respondents)
- Too much hassle/takes too much organising (18 per cent)
- Total time taken for the door-to-door-journey (18 per cent)
- Total time taken for the rail journey (15 per cent)
- Car is more convenient (10 per cent)

*(note: respondents were able to select more than one reason)*

However, this research also points to the impact of perceptions. Part of the research involved people switching to rail rather than use their car. It was discovered in some cases that the rail journey was actually cheaper than people had thought.

Transport Focus's input to the Greater Anglia rail franchise highlighted similar issues:

### **Value for money**

Rail travel was often perceived among non-users to be expensive, especially for groups. This was partly due to media coverage of the industry but also because rail fares were viewed as a discretionary or 'luxury' cost on top of the 'essential' cost of running a car.

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<sup>7</sup> Integrated Transport: perception and reality. Transport Focus 2010

### *Journey time/convenience*

Point-to-point journeys by rail could be quicker than by car. The barrier was the total journey time and the additional planning required to get to the departure station and from the arrival station to their final destination. Interchanging was often cited as a major disincentive to rail travel no matter whether within or between modes.

*“You can jump straight into a nice dry and warm car outside your house and you can go where you need to go. Whereas if you’ve got to get from your house to the train station, it’s either driving there or getting a taxi and then again at the other end because it’s very unlikely that the train station is going to be outside of where you want to be”* [Norwich, Lapsed/Non-user]

### *Ease of planning*

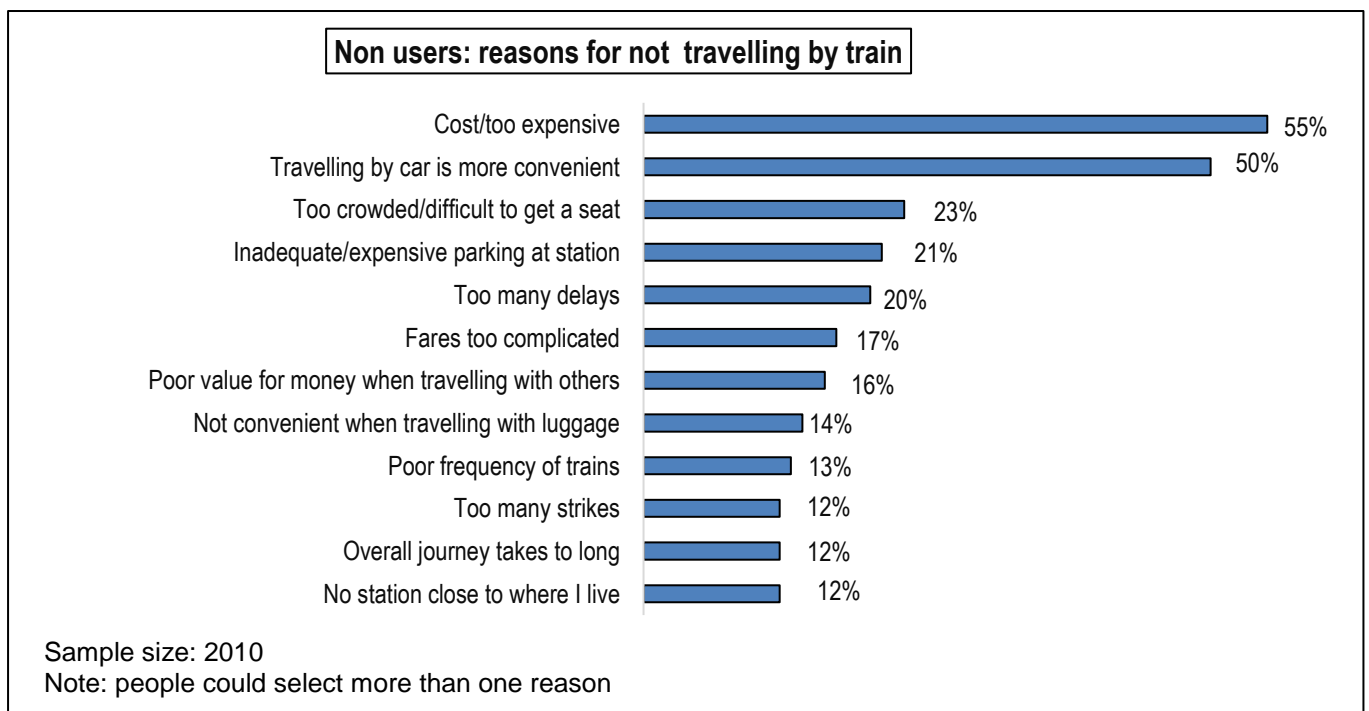
Planning can be hampered by a lack of familiarity with the journey, especially if ongoing connections to and from the station have to be factored in.

Timetables were also a barrier of sorts. Some found timetables difficult to understand while others felt that they highlighted how inflexible public transport can be in relation to the car.

*“If you go by train you’re dictated by the time the train goes but if you go by car you can go when you like”* [Cambridge, Lapsed/Non-user]

*“I get in the car outside the house and drive to where I want to drive when I want to drive”* [Norwich, Lapsed/Non-user]

Transport focus revisited these questions in its 2018 research. There was little change in attitudes:





Cost remained the main barrier across the board, with no differences amongst the key demographic sub-groups.

Convenience was again another key factor. Older people, people living in village or isolated locations, and those with higher household incomes were more likely to state that travelling by car is more convenient than the train.

However, others identified additional issues relating to convenience such as having a health condition or disability that makes it difficult (12 per cent), finding the bus or coach more convenient (11 per cent), or finding it inconvenient to travel by rail with children (six per cent).

DfT's 2018 research also came up with similar themes. It asked infrequent users of short- and long-distance rail services why they did not use them more often.

For short-distance journeys the main/principle reason for not using rail were:

- It's easier by car (49 per cent)
- Train fares are too high (11 per cent)
- Its quicker by car (8 per cent)
- Trains don't go where I want to go (8 per cent)

For infrequent long-distance rail users the main reasons given were:

- It's easier by car/plane (36 per cent)
- Train fares are too high (19 per cent)
- It's not convenient (14 per cent)
- I think its cheaper by car/place (7 per cent)
- Trains don't go where I want (6 per cent)

All the research firmly points to cost and convenience being the main barriers to using rail more.

However, once again it is not simply a case of looking at the actual cost of travel or the actual journey experience. As has been set out earlier, perceptions also matter – it can sometimes be the perceived cost of travel or the perceived inconvenience of using rail that forms the barrier.

Fundamentally, many non-users do not know enough about train travel to feel confident about what they may potentially be buying:

- will there be seats?
- will there be delays?
- will Wi-Fi, toilets, plugs, or storage space be provided?
- will the train be old and worn or will it be warm and comfortable?
- will I be able to interchange in time?

## Potential improvements to drive greater use of rail

It is important to understand people's attitudes to rail and their reasons for not using trains. However, from a commercial perspective it is even more important to know what could make people use rail more.

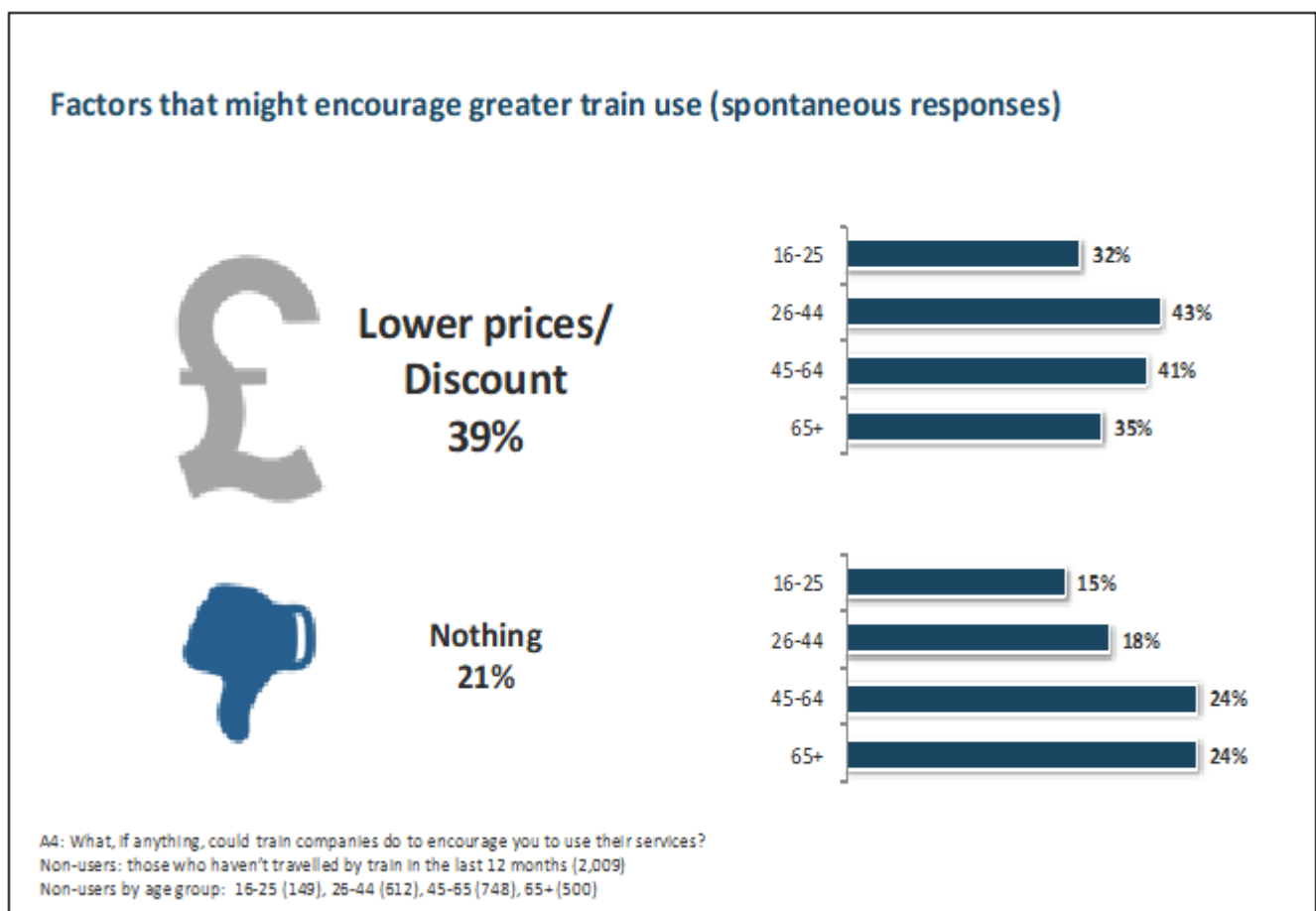
There are two aspects to this – what might persuade non-users to give rail a go and what might persuade existing but infrequent users to use rail more often.

### Non-users

Transport Focus's 2018 research asked what, if anything, train companies could do to increase non-users' rail travel.

The spontaneous (unprompted) response given was to lower prices. This was cited by 39 per cent of non-users. A further 21 per cent said that nothing could be done to encourage them to use train services more.

Older passengers were the most likely to say that they couldn't identify anything to make them use trains more often, with those in the middle age groups most likely to say that lower prices would make a difference.



Some of the quotes we captured in the research provide more flavour:

*“Be even remotely close to other [transport] in price and I'd use it much more.”*

*“Drastically reduce fares.”*

*“Offer free fares to pensioners, the same as the buses!”*

*“Nothing - I'm too old now to change.”*

*“Nothing. With my car I can go door to door cheaper than the train.”*

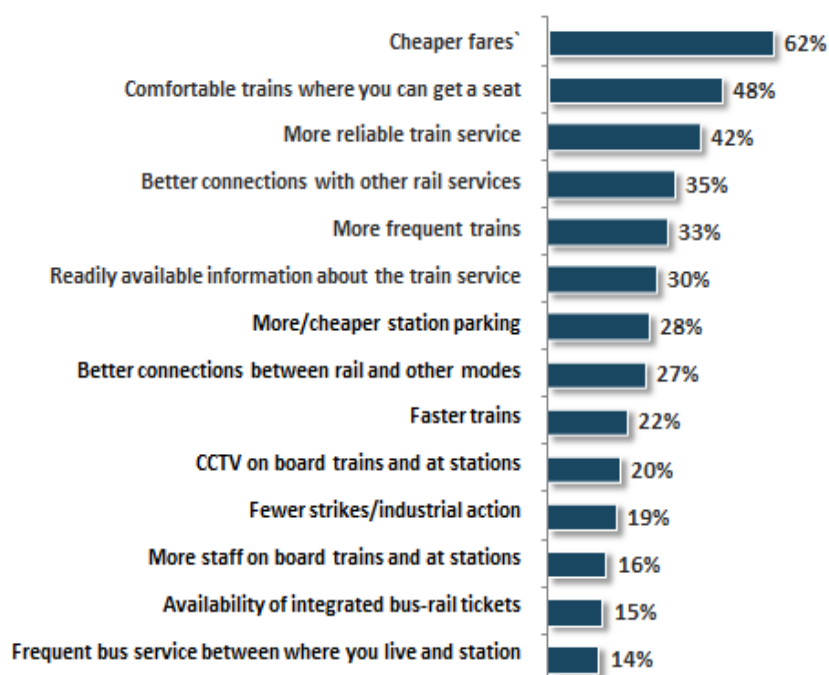
*“Nothing, prefer the convenience of a car.”*

Non-users were then presented with potential improvements or changes that train companies could make and asked how likely each of these would be to increase their use of trains.

Unsurprisingly, given its predominance as both a barrier and a spontaneous improvement, cheaper fares were again the change that non-users felt would most likely impact their future take-up of rail services.

### Possible improvements to the rail service

#### Net likelihood to encourage more travel by train (likely minus unlikely)



A5.1 I am going to read you a list of possible improvements that could be made to the rail service. I would like you to say for each how likely it would be to encourage you to travel by rail on a scale of 1 to 5 where 1 is 'Very unlikely' and 5 is 'Very likely'  
Non-users: those who haven't travelled by train in the last 12 months (2,010)

However, issues beyond cost also came to the fore, with comfort of the on-train experience something that could be a positive influence, as well as the reliability and connectivity of the train service overall.

Those in education are a group that shows strong potential to be converted to train use (perhaps due to their likelihood to travel relatively locally at present but looking to a future in employment when train travel is more likely). This group were more likely than the average non-user to state that comfortable trains, more reliable and more frequent trains and better connections would encourage them to use trains more.

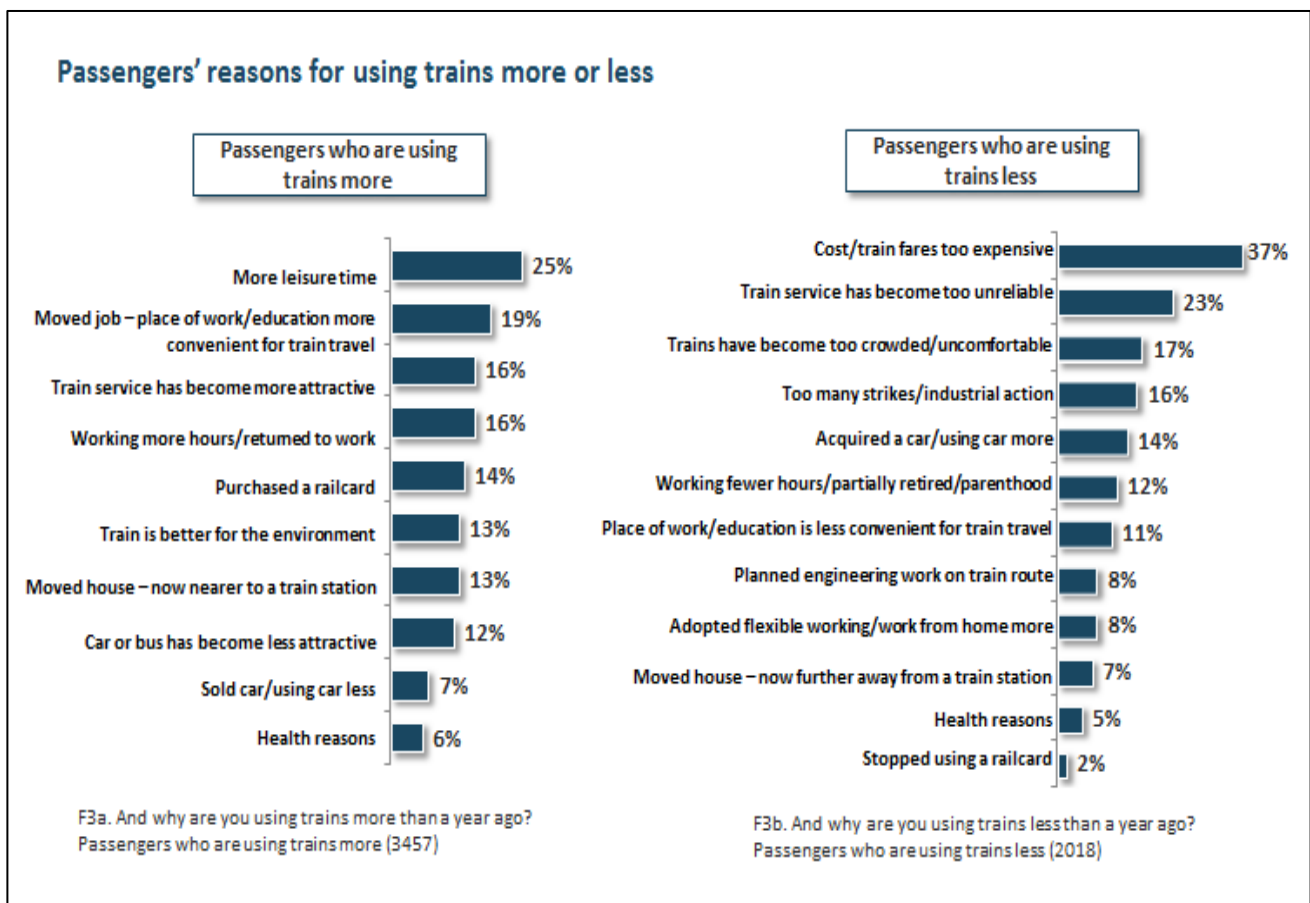
Non-users who live further away from stations, those who use a car daily and those travelling for business are more likely than average to be persuaded by more or cheaper station parking.

### *Existing passengers' – reasons for using trains more or less*

Transport Focus's 2018 research also asked existing passengers why they were using trains more or less frequently.

Those who were travelling more frequently typically did so because of a change of circumstances – either having more leisure time or a result of moving jobs or leaving education.

Those who were using trains less often cited expensive fares and unreliable/ crowded services.



Once again, quotes captured during the research make for interesting reading:

*“Cheaper prices and easier to find the cheapest and see when they cannot be used, I don’t always know when is peak and what happens if I miss my booked train. Can I travel on another similar time train?”*

*“Have more carriages to ensure everyone gets a seat. During my last journey I was forced to stand and I felt so claustrophobic and anxious that I collapsed on the train.”*

*“Lay on more trains at peak time with longer carriages.”*

DfT’s 2018 research also looked at what improvements would encourage infrequent users of short- and long-distance services to use rail more.

Short-distance:

- cheaper fares (48 per cent)
- more frequent trains (19 per cent)
- railway station nearer to home/destination (16 per cent)
- more reliable and punctual trains (13 per cent)
- more routes (11 per cent)

Long-distance:

- cheaper fares (66 per cent)
- more frequent trains (18 per cent)
- more routes (17 per cent)
- less crowded trains (15 per cent)
- faster journey times (14 per cent)

## Conclusions

There are clearly some people for whom rail travel is not a realistic option. If services do not go where people want to travel or at the time they need to go, then there is little the industry can do. Likewise, there will be people who simply will not switch from their current mode of travel, usually their car. Transport Focus's research found that, for one-fifth of people, there was nothing that would persuade them to use rail. However, that still leaves the remaining four-fifths as a potential market.

The common overriding theme throughout all the research is that the main barriers to travel surround cost and convenience. Similarly, the main things that could overcome these barriers are to do with the price of the ticket and the quality and level of service provided (frequency, reliability, comfort).

It is equally clear, however, that it is not just the actual cost or convenience that can act as a barrier – perceptions also matter. Negative perceptions create their own barrier to rail travel.

### *So what could be done?*

There is a relationship between the things that existing users want to see improved and the barriers identified by non-users. Transport Focus's research<sup>8</sup> sets out the top five priorities for improvement identified by passengers:

1. better value for money
2. being able to get a seat on the train
3. more trains arriving on time
4. less-frequent unplanned disruptions
5. fewer trains cancelled.

What this suggests is that train companies can broaden the appeal for those currently not using their services by continuing to focus on the improvements identified by their current passengers.

This requires continued investment to improve capacity and frequency, a focus on driving up levels of punctuality and much more attention on how disruption is managed.

The programme of fares reform<sup>9</sup> recently announced also offers considerable opportunities. The proposal contains a lot of things that are sensible and long overdue: single journey-based pricing will simplify and make the system easier to explain, a best fare guarantee will improve confidence and trust, and new fares that match the way that people want to travel today will make rail more attractive. All of these should also appeal to non-users.

However, it will be critical to communicate any improvements clearly, as without the benefit of experiencing any changes, non-users are unlikely to know any concerns have been addressed.

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<sup>8</sup> Rail passenger priorities for improvement. Transport Focus. 2017

<sup>9</sup> Easier Fares for all. RDG. 2019



Making things better for everyone is a very laudable aim but will be, of necessity, a longer-term objective. In the meantime, the research does suggest that some individual groups of non-users could be targeted specifically.

### *Disabled passengers*

Within Great Britain, users with a mobility difficulty made around two and a half times fewer trips per year on average by rail compared to those with no mobility difficulty in 2017<sup>10</sup>.

In 2014/15 the Department for Work and Pensions estimated that disabled people and their families in the UK had an aggregate annual household income of £249 billion<sup>11</sup>. The campaign group Purple<sup>12</sup> estimates that the transport sector loses up to £42million each month through not being accessible.

This suggests that there is a potential market that can be developed.

At its most basic this requires continued investment to remove physical barriers (for example, in providing step-free access at stations) but to be most effective it should also address all stages of a journey: being able to plan journeys, getting to and from the station, buying a ticket, station and train facilities and the availability of staff.

Building confidence is another issue – will the train run as planned, will the toilet be open, will staff be there to help, what happens if services are disrupted? This applies to all passengers but the consequences of getting it wrong can be much greater for some passengers with a disability.

The Association of Community Rail Partnerships (ACORP) produced a report on social inclusion which highlighted the benefits arising from building confidence in using the railway<sup>13</sup>. This included talks, workshops and visits with local schools, organisations and support groups. The report sets out several successful case studies:

- Community Rail Lancashire's Railway Confidence Programme has helped build confidence and understanding with more than 150 young people
- The Leeds, Lancaster and Morecombe Community Rail Partnership has worked on making the 'Bentham Line' a dementia friendly railway.
- The Welsh Government funded the 'Orange Wallet' scheme designed to help anyone with a hidden disability, especially those on the Autistic Spectrum, communicate their specific needs to railway staff.
- The Sussex Community Rail Partnership and the Southern train company ran a series of 'try the train' trips for individuals with learning difficulties. This involved a funded and escorted train journey where individuals could get to grips with buying a ticket, finding the right platform and how to use ticket barriers.

<sup>10</sup> The user experience of the railway in Great Britain. Williams Review team. 2019

<sup>11</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/572187/spending-power-of-disabled-people-and-their-families-2014-15.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/572187/spending-power-of-disabled-people-and-their-families-2014-15.pdf)

<sup>12</sup> <https://wearepurple.org.uk/the-purple-pound-infographic/>

<sup>13</sup> Community Rail and Social Inclusion. ACORP. 2018

### *Younger passengers and those in education*

Transport Focus's research suggests this is the group that is more likely to change behaviour in relation to train usage. They are more receptive to the improvement suggestions and are least likely to state that 'nothing' would encourage them to use trains more.

Barriers that are particularly relevant to them at present include areas relating to timetables and the frequency and reliability of service.

Cost and value for money is another barrier. The recent announcement of a new railcard, offering a 50 per cent discount, to 16-18 year olds will help younger passengers. They, along with all passengers, will also benefit from the reform of fares and ticketing outlined in the Easier Fares proposals<sup>14</sup>. Making buying a ticket easier and more convenient and introducing a range of tickets that recognise modern working patterns will all help to make rail travel more attractive.

### *Frequent car users*

This is a group where the car, and the convenience it provides, presents the strongest challenge to the take-up of train usage. There are three areas to think about here:

- The availability and cost of station parking. This is an area that clearly needs to be addressed (or current perceptions challenged) in order to convince this audience that rail travel is a convenient option.
- The perception that travelling door-to-door by car is easier/quicker/cheaper than using train for at least some of that journey.
- The cost when travelling in a small group. Four people in a car can share petrol costs and reduce the cost per person. On rail the cost typically increases with each extra person travelling. The new Two Together railcard has helped address this – the fact that over 215,000 were issued in the first year alone shows the potential market<sup>15</sup> - but there is still scope to look at situations where larger groups of people are travelling together.

### *Older and retired passengers*

This is the group whose behaviour is likely to be most difficult to shift. Many are frequent car users, live in villages and further away from train stations, and also have greater concern with regard to mobility. One tangible issue to address is the perceived complexity of fares and ticketing, which is particularly seen as a concern by older passengers.

There is therefore an important job to be done in communicating positive stories to this audience. One of the potential ways to address this is to offer free 'taster' journeys so that these older customers can experience travel on the modern railway first hand.

This concept of offering free journeys is also something that could be used on a much wider basis by the railway. As well as targeting specific groups of non-users it could also be applied on a station or route basis or to accompany local events. If carried out as part of a trial or pilot it should also be possible to measure the effectiveness of such marketing.

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<sup>14</sup> Easier Fares for All. RDG. 2019

<sup>15</sup> Rail Magazine. March 2015 <https://www.railmagazine.com/news/network/2015/03/05/two-together-railcard-helps-passengers-save-20-million>



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Fleetbank House  
2-6 Salisbury Square  
London  
EC4Y 8JX

0300 123 2350  
[www.transportfocus.org.uk](http://www.transportfocus.org.uk)  
[info@transportfocus.org.uk](mailto:info@transportfocus.org.uk)

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